# Growth Management Framework for Howard County APFO

Presentation to Howard County APFO Task Force, 6/17/2015

Jeff Bronow, Chief
Division of Research
Howard County DPZ

# Growth Management Framework

- Growth Management Policy Overview
- Historical change in population & land use
- Development Monitoring System
- Household and population projections
- Fiscal Impact Analysis

# Growth Management Policy

- The General Plan sets growth pace
- Projections are in the General Plan
- County & regional agencies use projections (HCPSS, Fire, Police, DPW, Citizen Services, Rec & Parks, Library, Baltimore Metropolitan Council)
- GP also sets other growth-related policies
   (location, density, redevelopment, MIHU, preservation & open space, infill, ... → zoning and other regulations including APFO are implementation tools)

# **Growth Management Policy**

- Howard County's first General Plan was adopted in 1960.
- Followed by 1971, 1982, 1990, 2000, 2012
- APFO adopted in 1992 following 1990 General Plan

1960 General Plan Title page





# GENERAL PLAN

HOWARD COUNTY PLANNING COMMISSION

#### **COUNTY COMMISSIONERS**

CHARLES M. SCOTT, President

NORMAN E. MOXLEY

ARTHUR K. PICKETT

#### PLANNING COMMISSION

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#### PLANNING STAFF

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THOMAS G. HARRIS, JR., Senior Planner

THEODORE H. SCHAEFER, JR., Planning Draftsman

GERALD W. VON MAYER, Geographer

ROSE H. McADAMS, Secretary

Excerpt from 1960 Howard County General Plan

Excerpt from 1960 Howard County General Plan

#### COUNTY PLANNING

## GOAL OF COUNTY PLANNING

NEED FOR PLANNING

# The Planning Process

"Planning is the art and science of preparing and administering within the framework of local government a long-range comprehensive general plan for the physical development of a county."

The goal of planning is to further the welfare of the people in the county by creating a more efficient and attractive community environment.

Planning is needed to prevent or solve problems created by:

Expanding population and by increased demands for public services and facilities such as water, sewerage and storm drainage.

Increased school enrollment with the need for additional schools and teachers.

Greater use of the automobile which has created a tremendous demand for more and better highways.

Population growth which has created a need for more and better housing and a program for removing deteriorated houses and buildings.

Changing economic base with resulting pressure from institutions and firms to locate in counties.

Changing agricultural pattern with resulting decrease in agricultural employment.

# RESULTS OF LITTLE OR NO PLANNING

Excerpt from 1960 Howard County General Plan Without planning, Howard County could easily deteriorate as sections of many unfortunate counties have, resulting in:

Slum areas caused primarily by overcrowding of land by buildings and by buildings being overcrowded by people.

Mixing of residential, commercial and industrial land uses, with a resulting decrease of property values and efficiency.

Major streets running through once quiet residential areas, creating dangerous streets and a poor living environment.

Inadequate and overcrowded schools, parks and other public facilities.

A decreasing tax structure with increased demand for services.

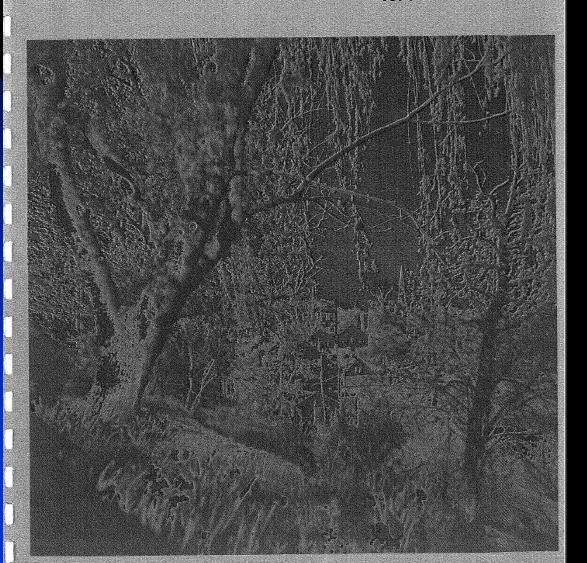
# BENEFITS OF GOOD PLANNING

By having a general plan:

It is possible for the various county departments and boards to coordinate their activities and to work toward the achievement of a common goal. The plan can prevent much duplication of efforts and bring about greater efficiency within the County Government.

GENERAL PLAN FOR HOWARD COUNTY

1971



#### HOWARD COUNTY

#### COUNTY COUNCIL

Edward L. Cochran, Chairman

Charles E. Miller, Vice Chairman

William S. Hanna

James M. Holway

Ridgely Jones

#### COUNTY EXECUTIVE

Omar J. Jones

#### **PLANNING BOARD**

E. Marcum Lynch, Chairman

William P. Brendel, Vice Chairman

Lloyd G. Knowles

Wilmer M. Sanner

J. Gordon Warfield

Thomas G. Harris, Jr., Executive Secretary

(Mrs.) Maxine R. Mullican, Secretary

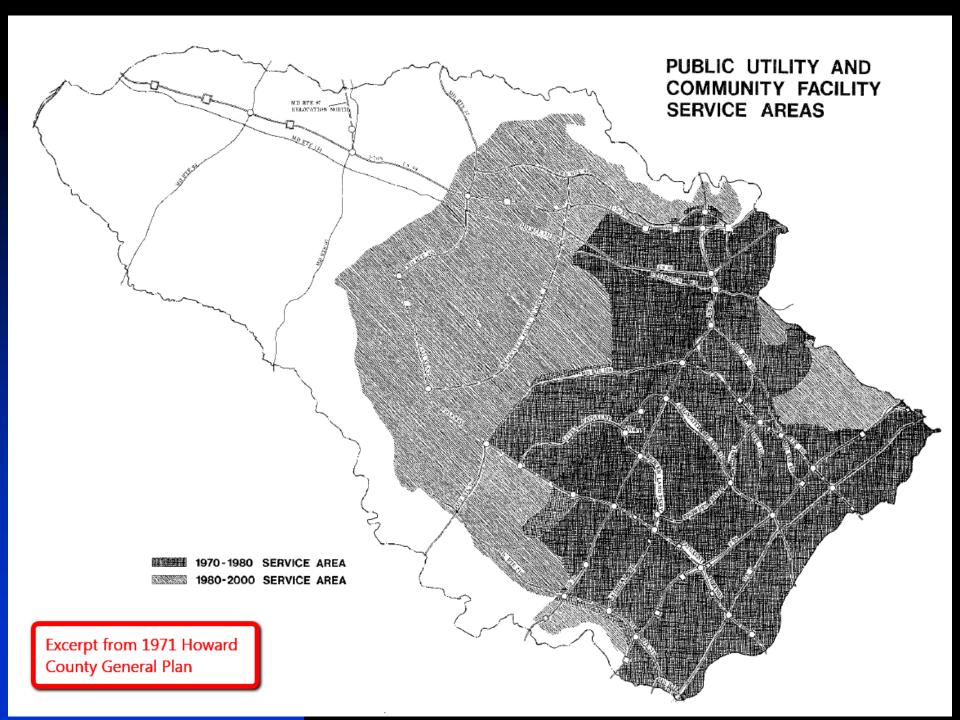
James N. Vaughan, Assistant County Solicitor

Excerpt from 1971 Howard County General Plan

The new General Plan for Howard County is both long ranged, as a policy guide for the general land use and conservation practices to be followed through the remainder of the 20th Century, and short ranged, detailing the specific development policies applicable to the ten-year (1970-1900) development period. The conceptual framework of the new general plan is intended to guide land development to those locations where the programmed capacity of public utilities and community facilities are designed to accommodate the anticipated levels of development, and in so doing it attempts to minimize premature development in areas that are beyond the planned service areas and to preserve agricultural areas. The Plan's basic policy is to foster orgeny and economic development within a design framework that is both responsive to the quality of the natural and built environment and to its human purpose. The General Plan is based on projections of population and economic development factors (public and private), on current and anticipated future trends in land development and on desired relationships among uses, existing and projected.

The Plan's comprehensive policy framework is organized on two major levels: (a) conservation level; (b) development level. The development level includes that portion of the County which lies within the 10 year public utility and community facility program service area; the conservation level constitutes the remaining area of the County which lies beyond the ten year service area.

Excerpt from 1971 Howard County General Plan



# GENERAL PLAN FOR HOWARD COUNTY 1982

Adopted May 3, 1982

and

August 2, 1982

#### **HOWARD COUNTY**

COUNTY COUNCIL:

COUNTY EXECUTIVE:

PLANNING BOARD:

Elizabeth Bobo, Chairperson Ruth Keeton, Vice Chairperson Lloyd Knowles Virginia Thomas Thomas Yeager

J. Hugh Nichols

Helen E. Ruther, Chairperson Sue-Ellen Hantman, Vice Chairperson William P. Brendel Roger S. Carter J. Gordon Warfield

Thomas G. Harris, Jr., Executive Secretary

Paul T. Johnson Assistant County Solicitor

Excerpt from 1982 Howard County General Plan The Plan's basic goal is to foster orderly and economic development within a design framework that is responsive to the quality of the natural and built environment and the social and physical well being of County citizens. The General Plan is based on projections of population and economic development factors (public and private), on current and anticipated trends in land development, and on desired relationships among existing and projected land uses.

The new General Plan for Howard County is a long-range policy guide for the general land use and conservation practices to be followed through the year 2005. The General Plan also outlines short-range measures detailing the specific development policies applicable to development during the present decade.

The conceptual framework outlined in the General Plan will guide land development to those locations where the public utilities are available and able to service anticipated levels of development. The plan also minimizes development in areas beyond the planned service areas and seeks to preserve prime agricultural land.

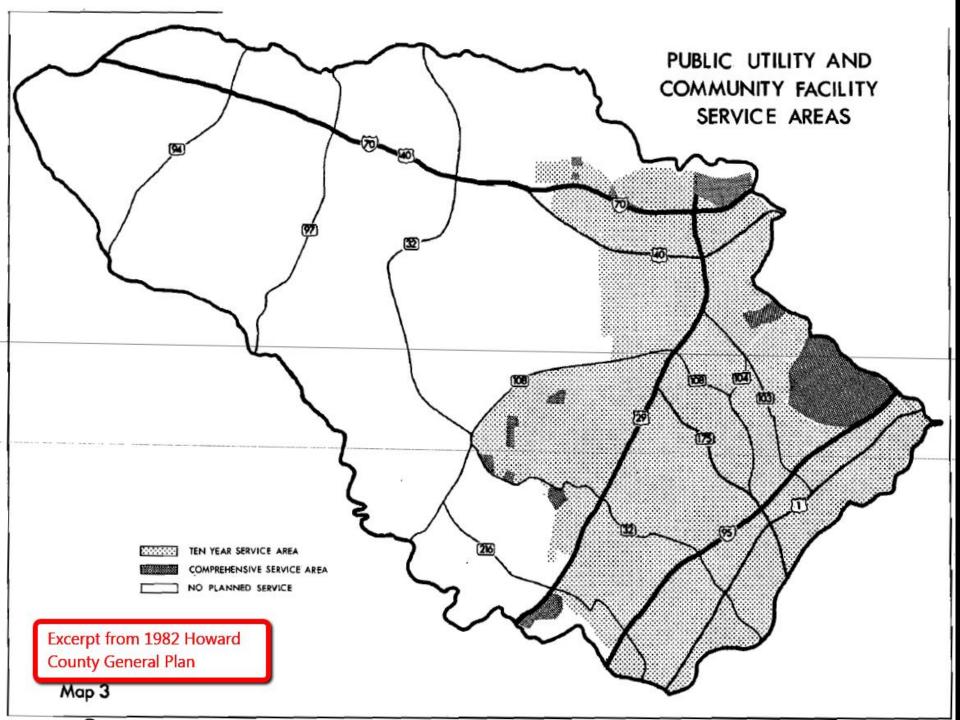
The Plan's comprehensive policy framework divides the County into (a) Conservation Areas, (b) Stable Areas and (c) Development Areas. The Development Areas generally and Stable Areas are within the public utility service area. The Conservation Areas are those parts of the County which generally lie beyond the public utility service area.

The Conservation District is designed to protect the natural environment and agricultural economy in the rural section of the County from uncontrolled and premature development. The Conservation District includes three designations: Conservation Reserve Areas, Rural Conservation Areas, and Protection Areas.

#### THE CONCEPTUAL FRAMEWORK

#### CONSERVATION

Excerpt from 1982 Howard County General Plan



# Howard County, Maryland

# The 1990 General Plan

... a six point plan for the future.

#### HOWARD COUNTY

COUNTY COUNCIL:

Shane Pendergrass, Chairperson

Paul Farragut, Vice Chairperson

Angela Beltram Charles Feaga C. Vernon Gray

COUNTY EXECUTIVE

Elizabeth Bobo

PLANNING BOARD:

Sue Ellen Hantman

Howard Harrison, III

Kathryn Mann

Kay B. Partridge

Helen E. Ruther

Uri P. Avin

Hugh Forton

Executive Secretary

Executive Secretary

Paul T. Johnson

Deputy County Solicitor

#### DEPARTMENT OF PLANNING & ZONING

Director

Deputy Director

Chief, Comprehensive and Transportation Planning Chief, Zoning Administration and Enforcement Chief, Community Planning and Land Development

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Except from 1990 Howard County General Plan

#### INTRODUCTION

along its suburbanized boundary. This Greenbelt does not preclude low intensity development, but will be a target of easement acquisition, directed clustering, and fee simple acquisitions to protect existing environmental and landscape resources in conjunction with related programs such as greenway planning.

In addition to the presentation of alternative Land Use Scenarios, the County produced a series of Issue Papers in the Fall of 1989 which dealt with the impacts of development on roads, schools, agriculture, fiscal and budget resources, and sewer capacity. These data-heavy products responded to the General Plan Guideline Task Force's priorities for study.

The General Plan spells out five significant growth management measures. In these, the County is to:

■ Stabilize western Howard County.

Encourage the continuation of farming; Preserve the existing

 Establish a more definitive suburban/rural demarcation.

> Limit expansion of sewer service area; Establish a "mid-County greenbelt."

■ Take advantage of regional location for job growth and corresponding housing opportunities.

Ensure adequate sites for non-residential development; Advance housing programs to maximize housing opportunities for all segments of the public.

Establish public facilities level of service standards to ensure that new growth does not contribute to future facility deficiencies.

> Utilize adequate public facility provisions in the existing Planned Employment Center (PEC) zone for all nonresidential development.

Commit to a strong capital budget to provide adequate public facilities.

Pursue advance acquisition of public facility sites; Expand the role and function of the County capital budget and fiveyear capital program to expedite expenditure of funds toward provision of public facilities; Ensure that new growth pays its fair share towards public facilities whose need is attributable to such development.

These growth management measures ensure that Howard County, while still absorbing a significant amount of regional growth over time, will remain a moderate density jurisdiction and will provide for the type of housing necessary to support its job base expansion for a healthy economy.

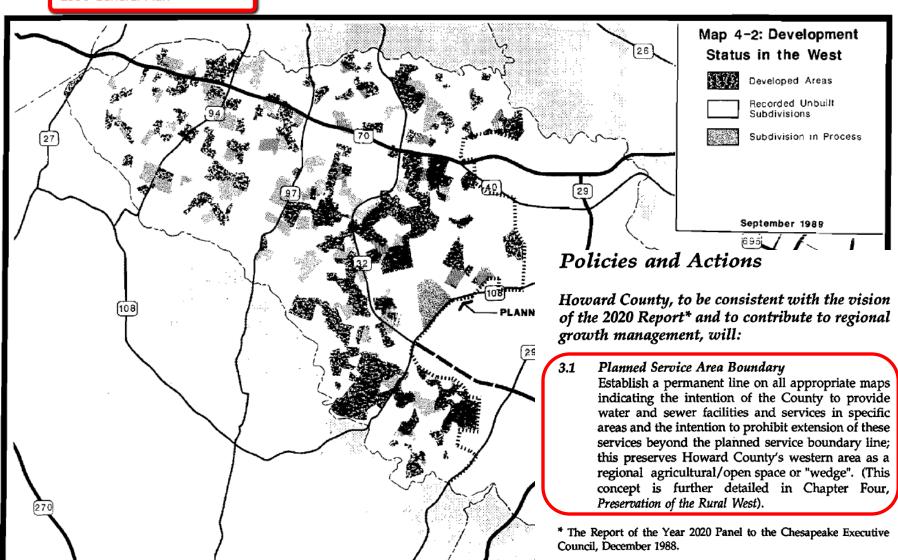
Because of the effects of the Growth Management Act of 1989 and of a proposed Adequate Public Facilities Ordinance, this Plan forecasts an annual average residential growth rate of about 2,500 units over the next 20 years. The Plan proposes that a Development Monitoring System be put in place so that if residential growth significantly exceeds the forecasts, which provide the basis for calculating future infrastructure and services needs, measures to limit growth will be taken.

The Plan is based on maintaining existing adopted levels of service in infrastructure and services. Because of the probable dwindling of State monies for roads and schools, this maintenance of service levels will be costly, particularly since the County plans to contribute selectively to State road building to accelerate essential improvements. Fiscal analysis of the Plan shows that, as long as our employment and residential growth can meet forecasted levels, the net cost of new growth will be marginal over the Plan's lifetime. While the Plan does not set a timetable for implementation of impact fees, it suggests that this equitable method of expanding the County's budget to handle the effects of new development will be needed

This twenty year Plan is organized around six themes. These are: Responsible Regionalism, which relates the County to its region and develops policies relevant to this inescapable reality; Preservation of the Rural West, which treats all the issues of the West as a whole; Balanced Growth, which covers the gamut of land use and service relationships to provide for a well-balanced Plan; Working with Nature, which treats environmental issues from a wide variety of perspectives; Community Enhancement, which focuses on how to design better communities and enhance those that we have; and Phased Growth, which deals with matters of growth management and the Plan's implementation.

The next section of this Plan briefly explains how this document is formatted so as to ease the reader's passage.

Excerpt from Howard County 1990 General Plan



Howard County



# GENERAL

A E | E | Adopted

James N. Robey, County Executive

November 8, 2000



County Executive: James N. Robey

County Council: Mary Lorsung, Chairperson

Guy Guzzone, Vice-Chairperson

C. Vernon Gray Allan Kittleman Christopher Merdon

Sheila Tolliver, Executive Secretary

Planning Board: Gary L. Kaufman, Chairperson

Joan C. Lancos, Vice-Chairperson

Haskell N. Arnold Florenzia W. Davis J. Landon Reeve, IV

Joseph W. Rutter, Executive Secretary Paul T. Johnson, Deputy County Solicitor

Department of Planning and Zoning: Dire

Director

Deputy Director Division of Transportation Planning

Division of Public Service and Zoning Administration

Division of Research

Development Engineering Division Division of Land Development

Division of Environmental and Community Planning

Joseph W. Rutter Marsha S. McLaughlin Carl S. Balser, Chief George Beisser, Chief Jeffrey Bronow, Chief Charles Dammers, Chief Cynthia S. Hamilton, Chief Elmina J. Hilsenrath, Chief

Excerpt from Howard County 2000 General Plan

### Excerpt from 2000 Howard County General Plan

#### Box 1-2 Sustainable Development

In recent years, sustainability has emerged as a planning concept. Sustainable development was first popularized by the World Commission on Environment and Development, established by the United Nations General Assembly to study connections between the environment and development. The Committee's 1987 report, Our Common Future, defined sustainable development as "meeting the needs of the present without compromising the ability of future generations to meet their own needs."

As amplified by the US President's Council on Sustainable Development, sustainable development addresses the need for more collaborative, flexible and creative approaches to environmental protection and economic development, the need to integrate these goals rather than viewing them as mutually antagonistic, and the need to include social equity concerns. Sustainable development focuses on a long-term perspective, with equal and integrated emphasis on the three legs of the "sustainability stool": economic prosperity, environmental quality and community well-being. The National Association of County Officials and the US Conference of Mayors are encouraging local jurisdictions to build these concepts into comprehensive plans, community plans, neighborhood revitalization efforts and economic development programs nationwide.

Some hallmarks of the sustainable approach to planning are:

Identifying the environmental, historic, cultural, social, economic

and other resources that make a community viable and unique.

- Seeking solutions that protect and make use of these resources while providing needed growth.
- Encouraging participation from all stakeholders in the community: residents, businesses, institutions, public officials and others.
- Seeking regional communication and cooperation.
- Arriving at solutions through consensus building and collaborative decision-making.
- Developing implementation strategies that define priorities, phasing, stakeholder responsibilities and funding.
- Using community indicators that measure trends related to quality-of-life issues to gauge progress in implementation.

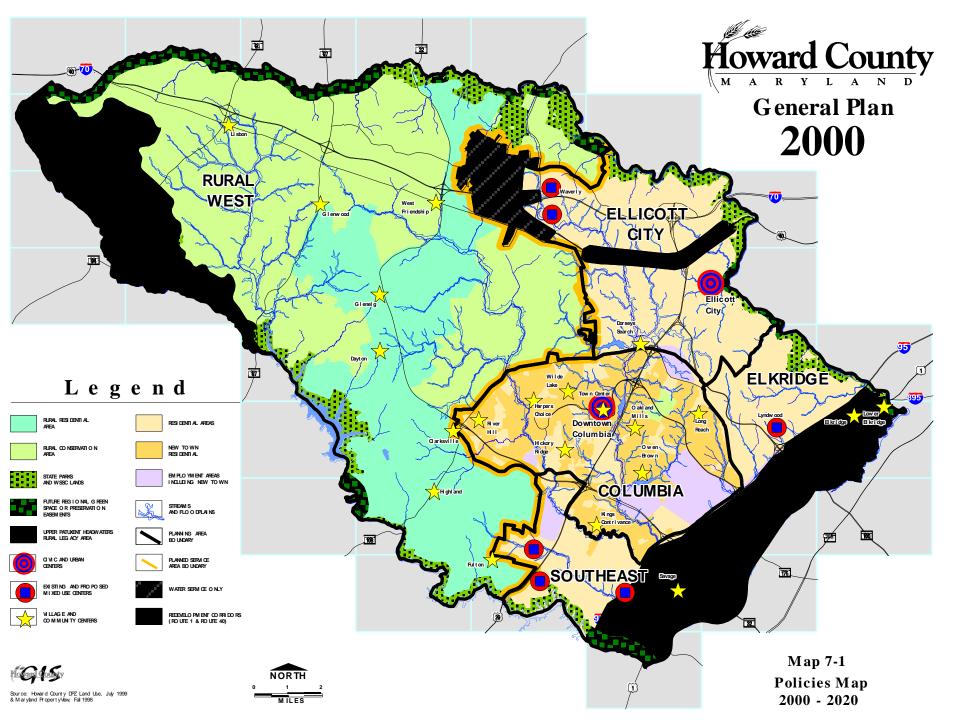
Sustainable development concepts are applicable to all levels of planning. They will be especially valuable as the County faces continuing growth pressure with increasingly constrained land resources, and as the County prepares to look more intensively at maintaining and improving the quality, value and livability of its maturing neighborhoods.

Six visions for Howard County's future support this central theme and provide a foundation for the *Policies and Actions* of this General Plan. These visions, which are developed in the six major chapters of this Plan, are:

- Vision 1: Our actions will complement State and regional initiatives in resource and growth management.
- Vision 2: Our rural lands will be productive and rural character will be conserved.
- Vision 3: Our development will be concentrated within a growth boundary, will be served by adequate public facilities and will encourage economic vitality.

- Vision 4: Our communities will be livable, safe and distinctive.
- Vision 5: Our environmental resources will be protected, used wisely and restored to health.
- Vision 6: Our citizens will take part in the decisions and actions that affect them.

While the six visions of this General Plan are derived from the State-wide visions of the 1992 Planning Act, they also reflect Howard County's particular resources and challenges. The relationships of policies adopted in this Plan to State planning requirements and growth management policies are noted in each chapter's introduction.





# PlanHoward 2030

Howard County, Maryland Amended February 4, 2013

#### Acknowledgements

Executive	Ken Ulman Jessica Feldmark Ian Kennedy	County Executive Chief of Staff Deputy Chief of Staff	Department of Planning & Zoning	Marsha McLaughlin Kimberley Amprey Flowers Dace Blaumanis	Planning Director Deputy Director
County Council	Mary Kay Sigaty, Chair Courtney Watson, Vice Chair Dr. Calvin Ball, III Greg Fox Jen Terrasa	District IV District I District II District V District III		Laura Boone Jeff Bronow Randy Clay David Cookson Lindsay Leiterman DeMarzo Jill Farrar	Elmina Hilsenrath Doug Kampe Bradley Killian Joy Levy Brian Muldoon Susan Overstreet
Planning Board	Dave Grabowski, Chair Jacqueline Easley Bill Santos	Josh Tzuker Paul Yelder		Carrie Grosch Bill Mackey Sharon Melis	Ben Pickar Mary Smith Samantha Lynn Stoney
Task Force	Ned Tillman, Chair Tudy Adler Nina Basu Kal Bhatti Steve Breeden Martha Anne Clark Phil Engelke Doug Erdmann Anwar Hasan Karol Hess Sarah Husain	Joe Mezzanotte Maria Miller Chris Murn Sang Oh Jay Parekh Elizabeth Rendon Steven Rice Dwayne Robinson Brent Rutley Bill Santos Peter Scheidt	Agencies	County Administration  Citizen Services Fire and Rescue Services Health Department Housing & Community Development Inspections, Licenses & Permits  Economic Development	Office of Environmental Sustainability  Police Department Public Works Recreation & Parks Technology & Communication Services  Howard County
	Andrea Ingram Daraius Irani Barbara Kellner Grace Kubofcik Joan Lancos	Maurice Simpkins Felícita Solá-Carter Sue Song David Steele Robert Turner		Authority Howard Community College Howard County Arts Council Robert Charles Lesser &	Library Howard County Public School System Parsons Brinckerhoff
	Ted Mariani Val McGuire	Sharonlee Vogel Cathy Ward	Consultants	Company Mahan Rykiel Associates, Inc.	Sabra, Wang & Associates, Inc.

Excerpts from Howard County PlanHoward 2030

#### **Executive Summary**

PlanHoward 2030 is the County's new general plan. With this new name comes a new, forward-looking approach and an exciting launch into a greener and more sustainable future – environmentally, economically, and for our communities. PlanHoward 2030 celebrates accomplishments and charts the next steps forward so Howard County can continue to enhance our high quality of life. Howard County's plan includes many of the new planning approaches from PlanMaryland, the new statewide development plan. This document is available online, as are all PlanHoward 2030-related materials, at www.planhoward.org.

This plan highlights key issues and goals for future planning efforts. In other words, *PlanHoward 2030* is a framework that sets out a scope of work and policies for the next two decades. Each policy includes appropriate implementation actions that are prioritized as one of three categories: short-term (one to three years), mid-term (four to seven years), and long-term (eight years or more). For a quick overview, summary matrices of policies and implementing actions are in Appendix A.

#### Overview

**PlanHoward 2030** is structurally organized into three major parts to address the three key aspects of sustainability – environment, economy, and community quality of life. With an introductory section and concluding implementation section, the plan is comprised of a total of five sections. **PlanHoward 2030** uses the 12 Maryland State Planning Visions to structure 12 chapters.

Section I, Introduction, includes the two overarching Maryland visions that guide *PlanHoward 2030*: Quality of Life & Sustainability and Public Participation. The second section, Environment, addresses two visions: Environmental Protection and Resource Conservation. The third, Economy, is comprised of three visions: Economic Development, Growth, and Transportation. The fourth, Community, addresses three visions: Public Facilities and Services, Housing, and Community Design. The last section, Action!, ends with two visions: Implementation and Stewardship.

**PlanHoward 2030** is an update to General Plan 2000. Two recently adopted general plan amendments, the Water Resource Element (WRE) and the Downtown Columbia Plan (DCP) will not be modified or replaced. These are included in **PlanHoward 2030** by reference.

#### Key Issues

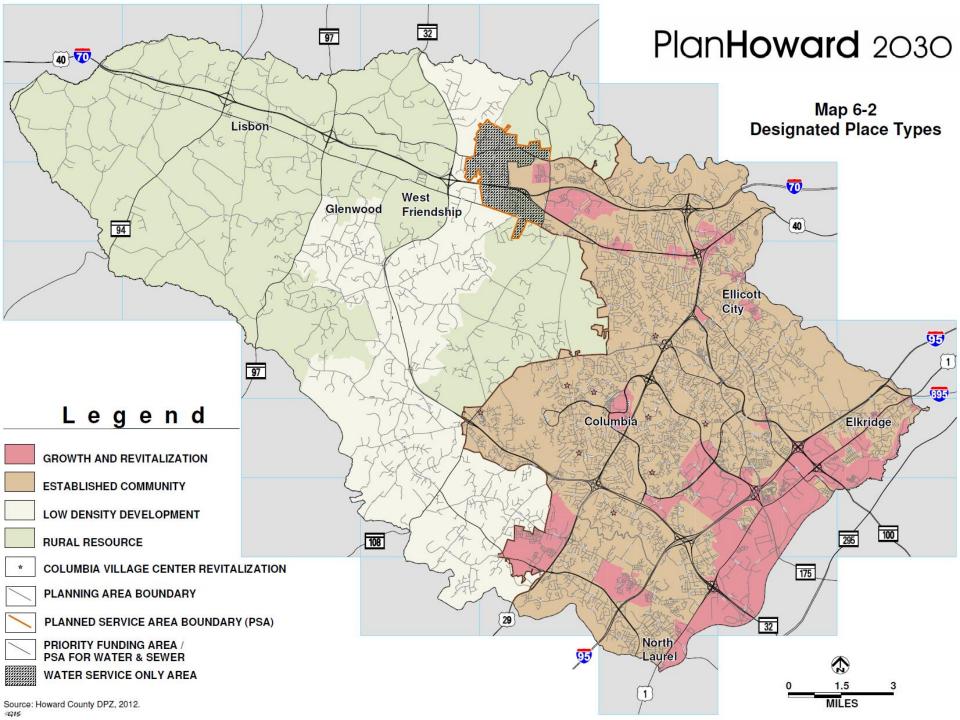
Since adoption of General Plan 2000, changing circumstances, new priorities and approaches, and the recent recession have modified what is needed in Howard County to sustain its high quality of life. For the next 20 years, the population will continue to increase and become more diverse with more diverse needs. The recent recession and slow recovery means State and local funding will likely remain constricted in the near term while needs are increasing. Partnerships and collaboration are essential to achieving *PlanHoward 2030* goals. Howard County has a progressive and innovative culture on which to build. Key initiatives include:

- Environmental Protection. New actions focus on implementation of a Watershed Implementation Plan to achieve mandatory water quality goals and promotion of environmental stewardship by diverse stakeholders.
- Resource Conservation. A new Green Infrastructure Network Plan is proposed; the land and character of the Rural West will be protected through strategies to enhance the farm economy and to balance agricultural, residential, and commercial uses; and expanded historic preservation initiatives are proposed.
- Economic Development. Strategies are recommended to promote business innovation and growth, and to make Howard County a leader in 21st century technologies. Particular attention is given to the US 1 Corridor and changing economic conditions identified by a market study. Workforce development and the promotion of training in science, technology, engineering, and math (STEM) are another focus.

Excerpt from Howard County PlanHoward 2030

- Growth. Addressing new State Smart Growth requirements, the County's existing pace of housing allocations is maintained but redistributed based on designated place types and growth tiers. Maintaining adequate public facilities remains a strong focus for the future, so a Fiscal Impact Analysis was prepared as a technical supplement.
- Transportation. Transit, bicycle, and pedestrian transportation receive greater emphasis, while also providing for the existing roadway network to be improved. Goals for strategies are proposed for enhancing the existing transit system via new service and increased regional cooperation, and for reducing personal vehicle miles traveled to improve air quality.
- Public Facilities and Services. County agencies' key programs and capital project needs are presented, as well as budget constraints and strategies for coordinated planning, priority setting, and partnerships.
- Housing. The County will continue to develop new models to provide sustainably affordable housing in mixed income communities, and to educate both home-seekers and the general public on the many benefits of compact, mixed-use, mixed income, location efficient homes.
- Community Design. The County will encourage well designed, context sensitive redevelopment in revitalization areas, as well as selective infill in existing neighborhoods to create more complete communities. Community plans, updates to zoning regulations, and other mechanisms will implement these goals.
- Implementation and Stewardship. County government must continue to innovate and provide leadership; however, everyone has a stake in enhancing Howard County's high quality of life. The foundation is laid for broad stakeholder collaboration and coordination to advance sustainability.

Excerpt from Howard County PlanHoward 2030





#### **INTRODUCTION**

Section I

Chapter 1 - Sustainability & Quality of Life

Chapter 2 – Public Participation

Provide Feedback planhoward.org

uComment &



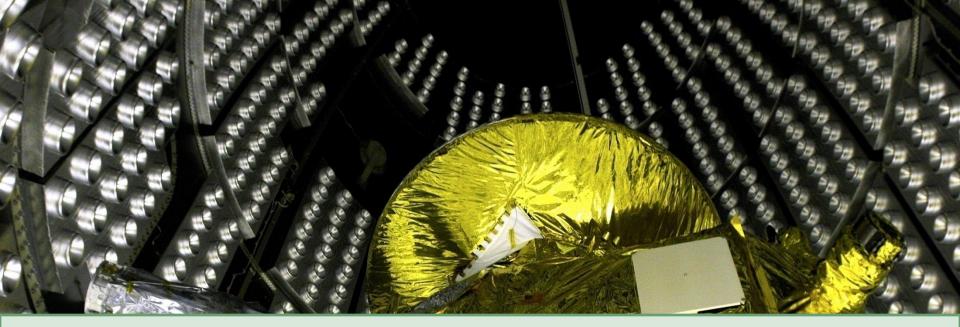


#### **ENVIRONMENT**

Section II

Chapter 3 – Environmental Protection Chapter 4 – Resource Conservation Provide Feedback planhoward.org





#### **ECONOMY**

Section III

Chapter 5 – Economic Development

Chapter 6 – Growth

Chapter 7 – Transportation

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#### COMMUNITY

**Section IV** 

Chapter 8 – Infrastructure and Services
Chapter 9 – Housing
Chapter 10 – Community Design

Provide Feedback planhoward.org





ACTION!
Section V

Chapter 11 – Implementation Chapter 12 – Stewardship Provide Feedback planhoward.org



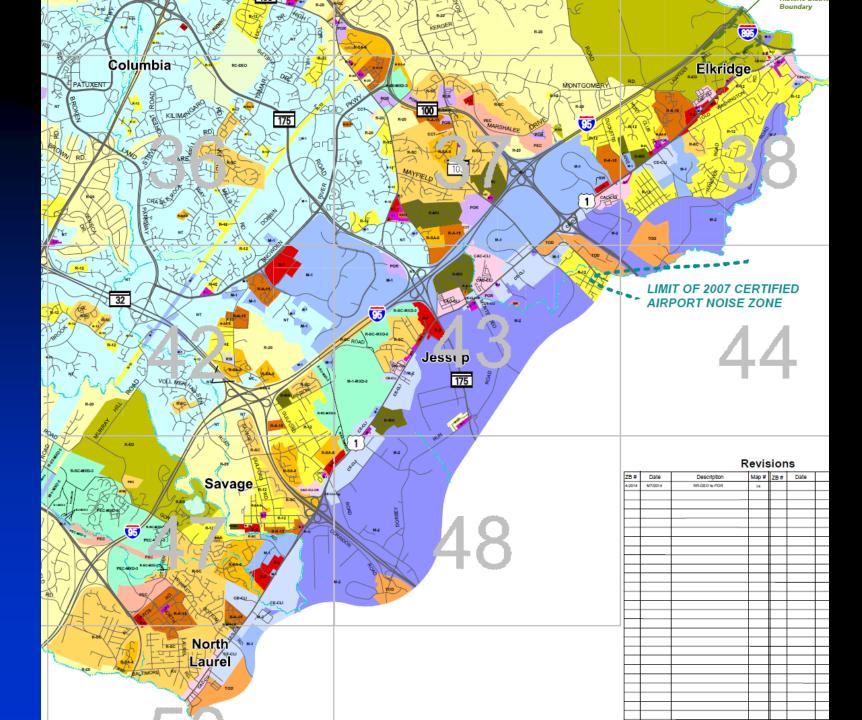






# **Route 1 Districts**

- Corridor Activity Center
  - Pedestrian oriented
  - 1<sup>st</sup> floor retail, office or residential above
- Transit Oriented Development
  - Near MARC stations
  - Multistory office, dense residential, some retail
- Corridor Employment
  - Office, flex, manufacturing
  - No auto or warehouse
  - Limited retail



# **Route 1 Revitalization**



A Nelessen Assoc., Princeton NJ

# **New Patterns**



A Nelessen Assoc., Princeton NJ

## **Mixed Use**



# Downtown Columbia 30 Year Plan Adopted Feb 1, 2010



### The Evolution of Downtown Columbia

Today







#### Development Program:

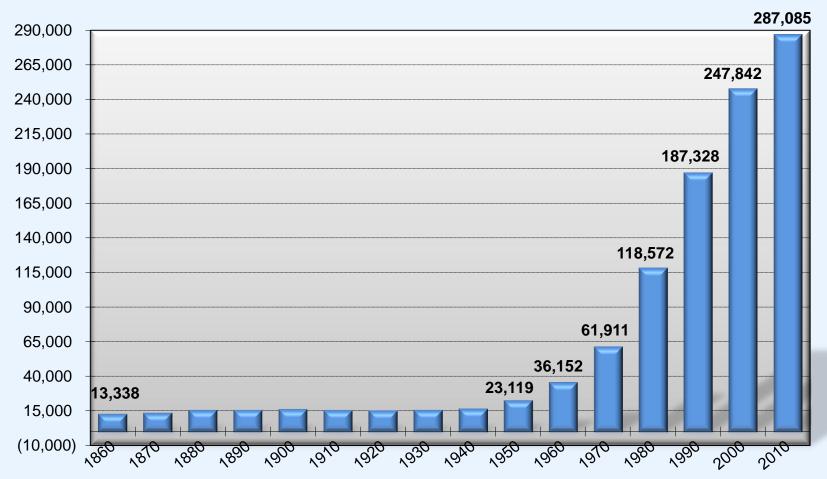
Residential Retail 5,500 units 1,250,00 sq ft

Office Hotel/Conference Center 4,300,000 sq ft 640 rooms

# Historical Change in Population & Land Use

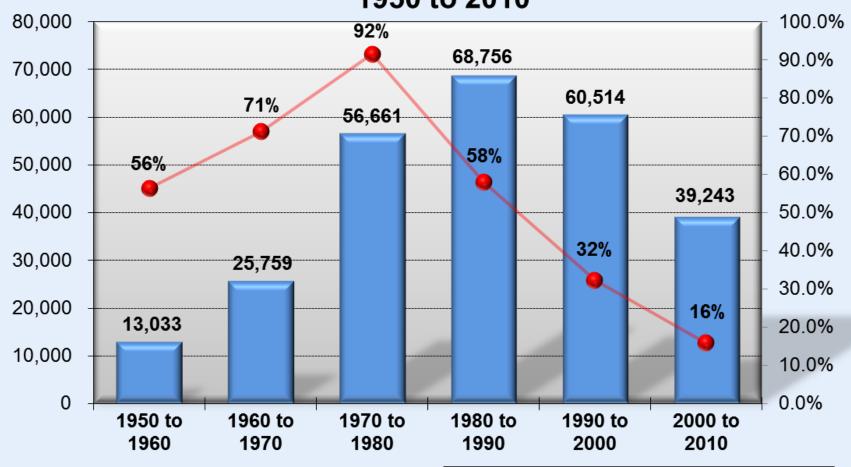
- Patterns set by land use policy
- Pace set by land use policy
- Important to keep in mind that market also plays an important role

### Howard County Population Growth 1860 to 2010



Source: US Census Bureau

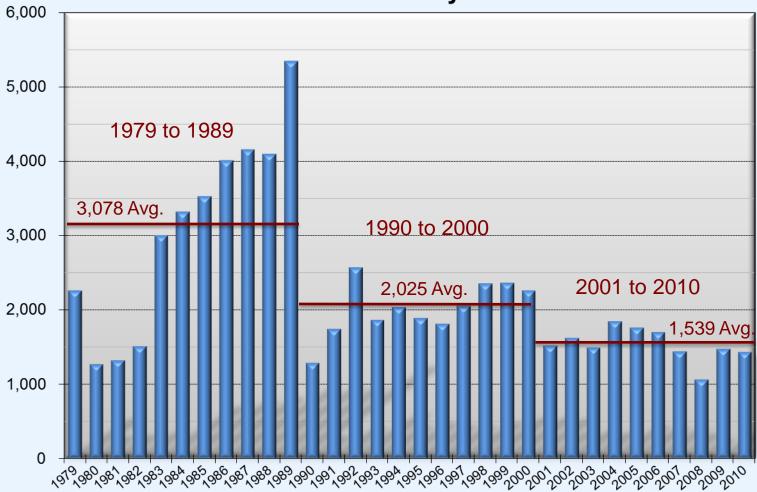
# Howard County Population Growth 1950 to 2010



■Population Growth → Percent Growth

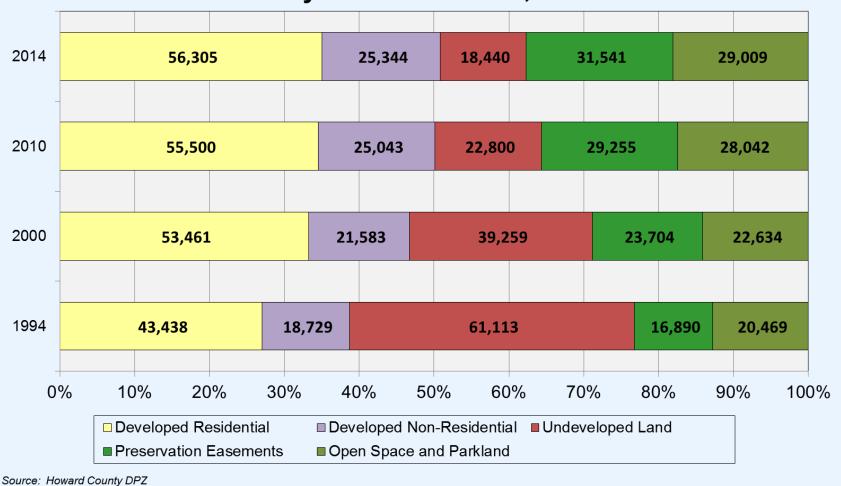
Source: US Census Bureau

## Total Residential Building Permits Issued 1979 to 2010 Howard County

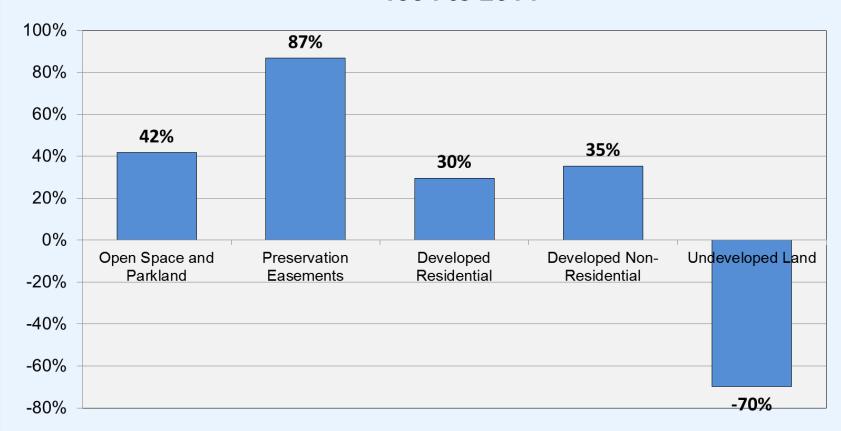


Source: 1990 to 2010 Howard County Department of Inspections, Licenses and Permits, 1979 to 1989 Regional Planning Council



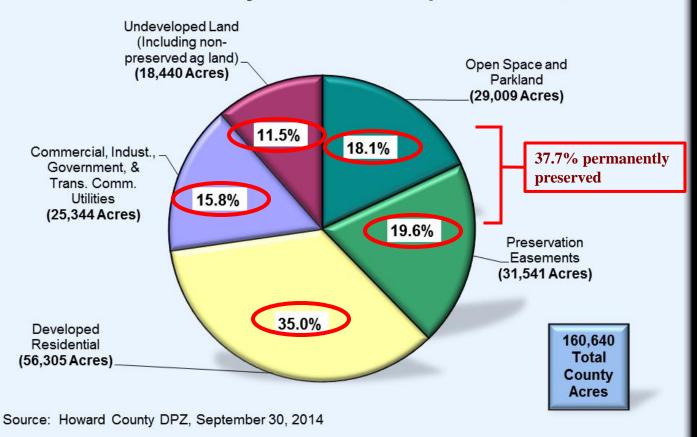


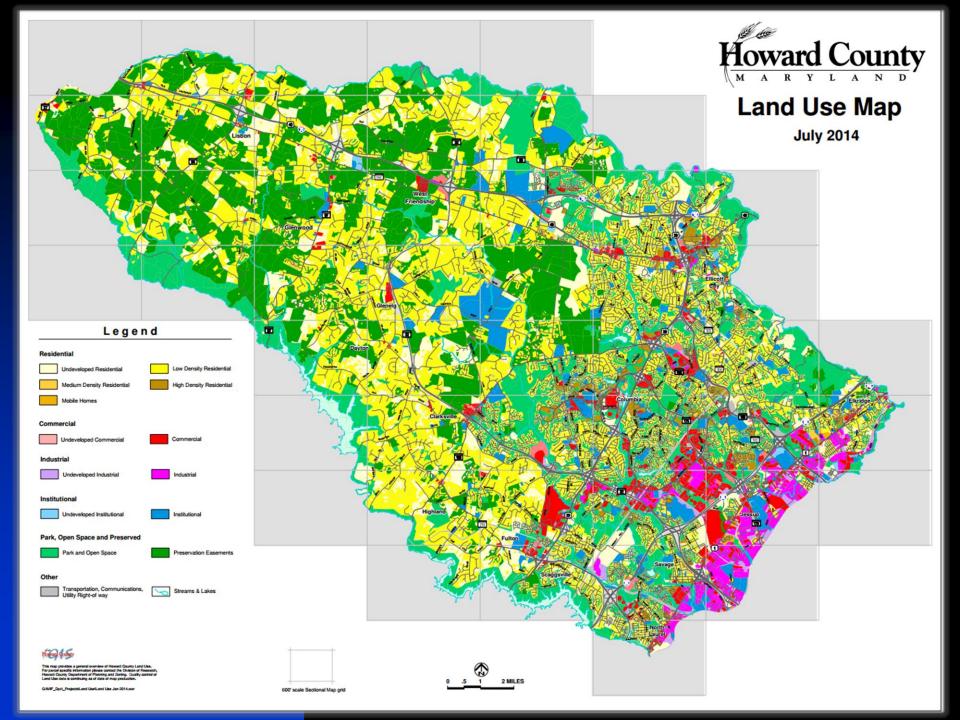
# Howard County Land Use - Percent Change 1994 to 2014



Source: Howard County DPZ

#### Howard County Land Use - September 30, 2014





# Development Monitoring System (DMS)

- Required as part of APFO
- Development tracked in real time (as plans come in and development occurs, not done in sporadic studies)
- Uses Geographic Information Systems (GIS)
- Annual report issued
- New elements added to the report per the MD's Smart, Green and Growing legislation
- DMS is important tool used for annual projections

Table 16 In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/14

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1	Downtown Columbia - Crescent	APT	2,300	2,300
All Other Columbia	SP-15-006	Enclave at Tierney Farm	SFD	148	148
Elkridge	S-14-001, F-13-108, F-14-046	Oxford Square - Remaining Phases	APT - 173 MIHU	1,143	
	S-06-018	The Overlook at Blue Stream - Remaining Phases	SFA, APT - 178 MIHU	966	
	S-06-010, F-15-062	Howard Square - Remaining Phases	SFA, APT - 71 MIHU	390	
	S-14-002	The Park at Locust Thicket	APT - 50 MIHU	387	
	S-15-002	Elkridge Crossing - Remaining Phases	SFA, APT	211	
	S-10-002, F-14-028, F-15-047	Morris Place	SFA - 25 MIHU	166	
	F-14-123, S-14-003	Shipley's Grant - Remaining Phases	SFA - 7 MIHU	78	3,341
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFD, SFA, APT	335	
	SP-14-008	Westmount	SFD	325	
	F-14-124	The Estates at Patapsco Park	SFD	195	
	F-08-85,-86/F-10-078/SP-15-003	Villages at Turf Valley	SFD, SFA	166	
	S-08-001	Turf Valley Clubhouse	SFD, SFA, APT	128	
	S-11-002	The Bluffs at Turf Valley	APT	114	
	F-10-084/F-10-086/F-07-158	Fairways at Turf Valley	SFD, SFA	98	
	F-15-018	Long Gate Overlook	SFA	79	

Turf Valley - Pod E

Turf Valley Clubhouse II

Deer Springs, Sec. 2

Centennial Lake Overlook, Sec. 2

Walnut Creek - Phases 3 & 4

Laurel Park Station - All Phases

Maple Lawn Farms - Remaining Phases

74

68

53

93

86

1,000

1,635

1,161

8,678

93

SFD, SFA

SFD

SFD, SFA

SFD

APT - 150 MIHU

SFD

SFD, SFA

S-11-004

F-14-081

S-11-003

F-13-026/F-13-034

S-10-004/P-11-004

F-15-040/F-14-118/S-06-016

F-14-023

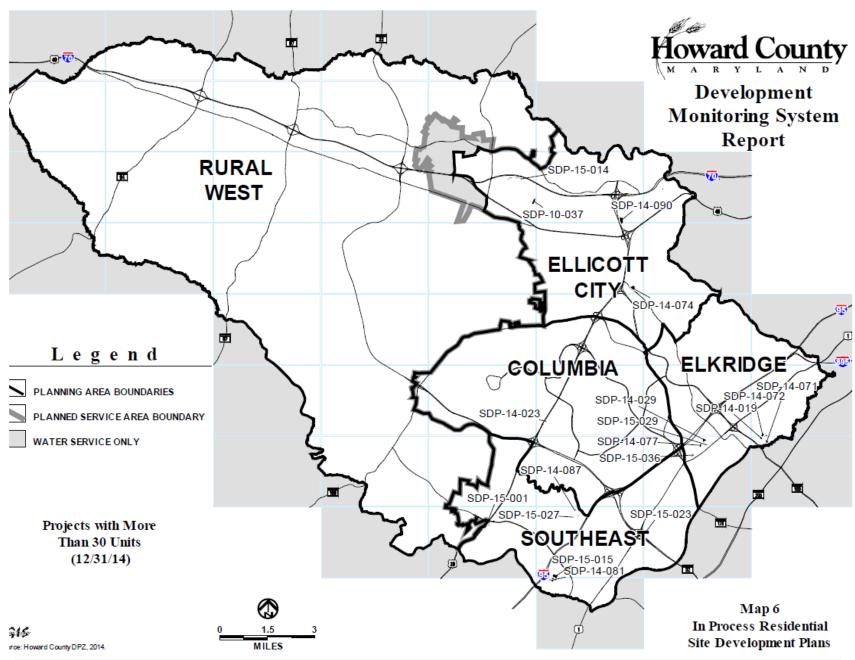
Rural West

Southeast

TOTAL

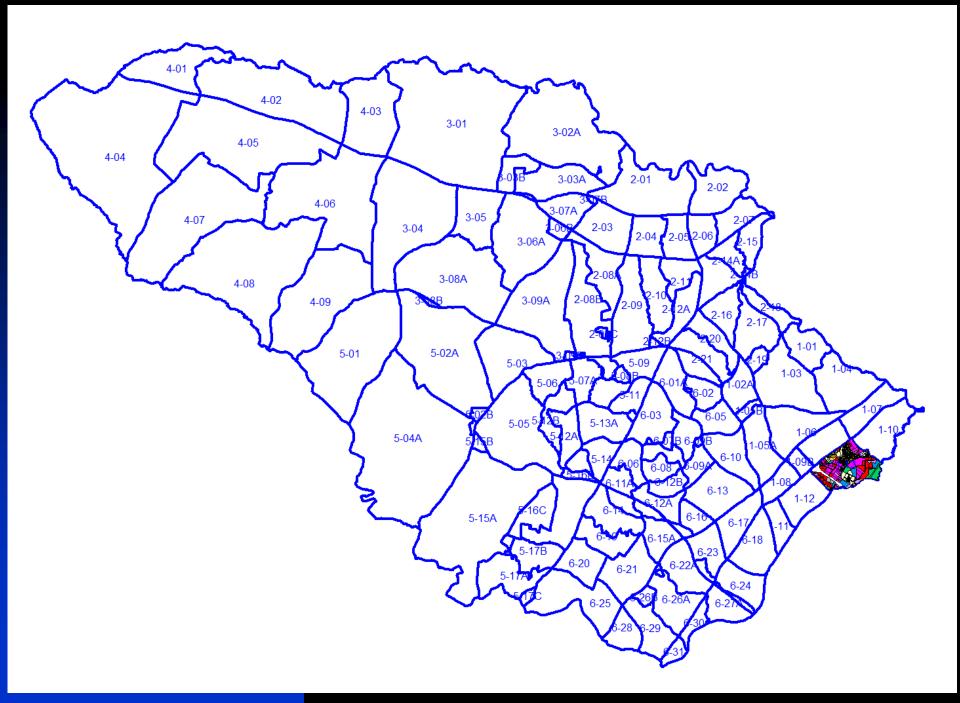
Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/14

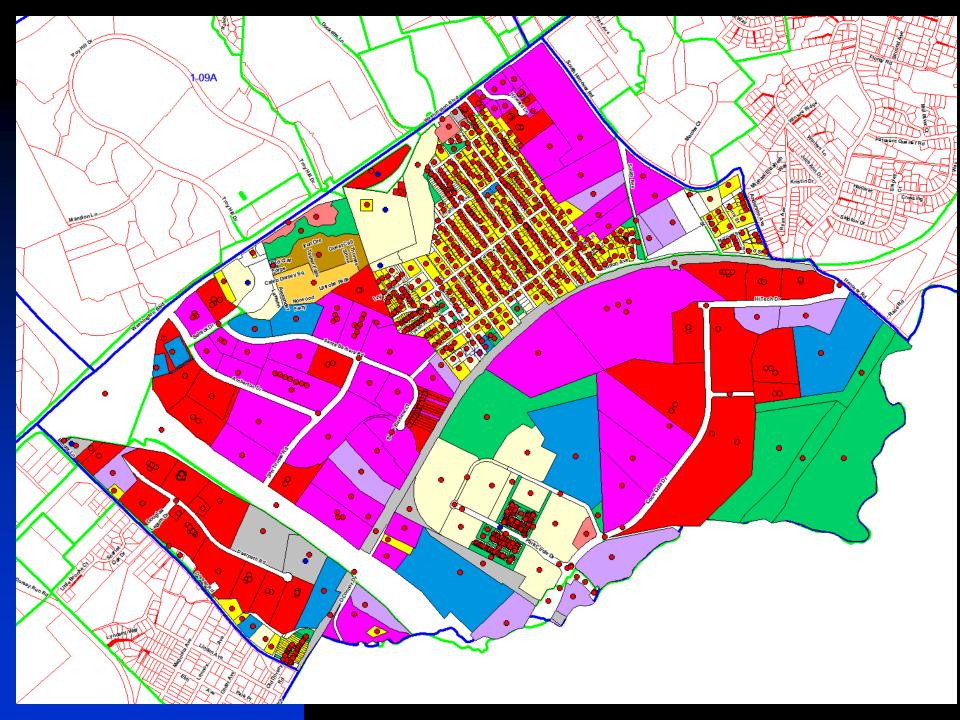
Region	File Number	Plan Name	Unit Type	Units	TOTAL	
Downtown Columbia	SDP-14-023	Warfield, Phase II	APT	437	437	
Elkridge	SDP-14-077	Brompton House (Blue Stream)	SFA, APT - 36 MIHU	194		
	SDP-14-072	Oxford Square, Parcel E	SFA - 24 MIHU	156		
	SDP-14-029	Blue Stream Towns, Sec. 2	SFA - 19 MIHU	105		
	SDP-14-019	Oxford Square	SFA - 13 MIHU	96		
	SDP-15-036	Howard Square	SFA - 19 MIHU	83		
	SDP-14-071	Oxford Square	SFA - 7 MIHU	42		
	SDP-15-029	Morris Place	SFA - 5 MIHU	34	710	
Ellicott City	SDP-14-090	The Gatherings at Ellicott's Retreat	APT - Age Restricted	162		
	SDP-09-039	Waverly Woods - Courtyards West - Ph. 5	SFD, SFA - Age Restricted	90		
	SDP-14-074	Long Gate Overlook	SFA - 8 MIHU	73		
	SDP-15-014	Villages at Turf Valley, Ph. 2, Sec. 2	SFD	48		
	SDP-10-037	Fairways at Turf Valley	SFA	47	420	
Southeast	SDP-15-015	High Ridge Meadows (Deer Springs)	SFD, SFA	75		
	SDP-14-087	Wincopia Farms	SFD	59		
	SDP-14-081	Deer Springs	SFD	54		
	SDP-15-027	Wincopia Farms	SFA	49		
	SDP-15-023	Day Resource Center	APT	35		
	SDP-15-001	Cherrytree Park	APT - Age Restricted - 4 MIHU	32	304	
TOTAL			-		1,871	

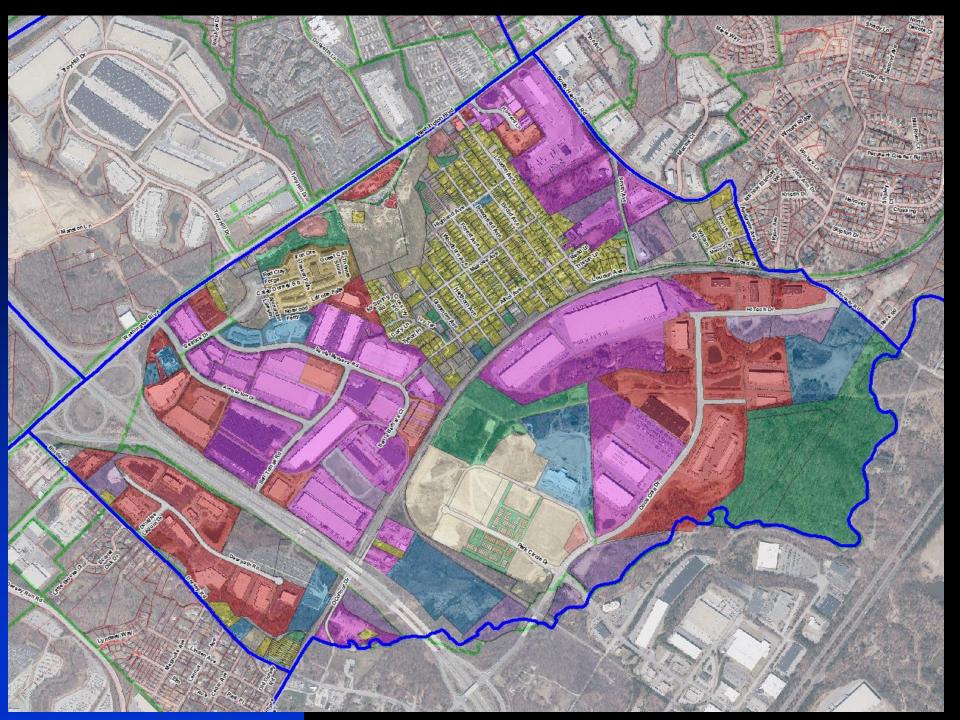


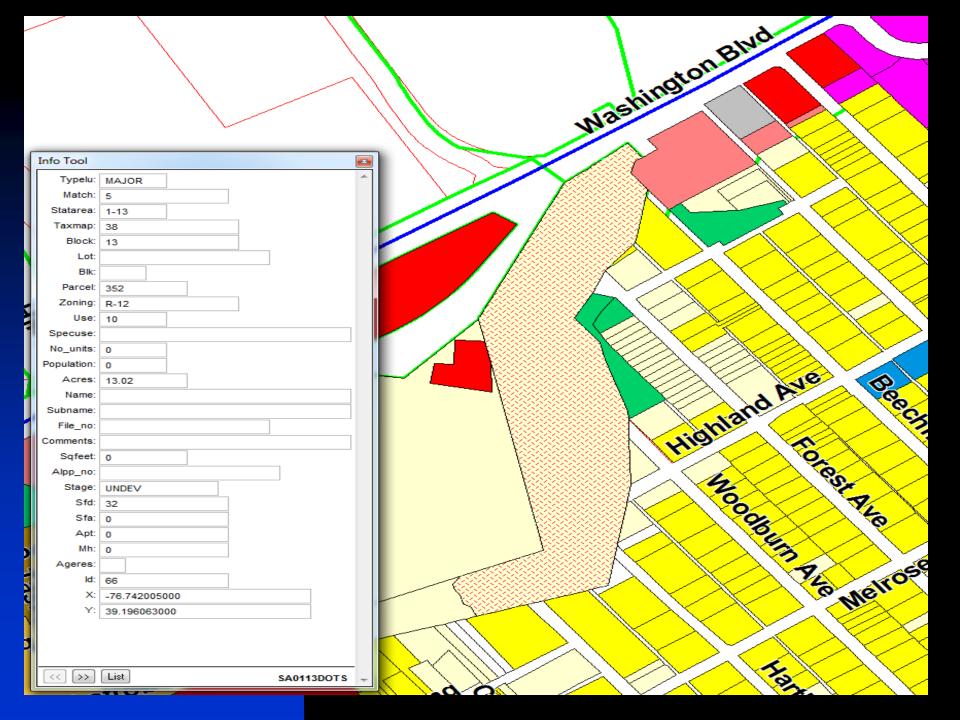
# Development Monitoring System (DMS)

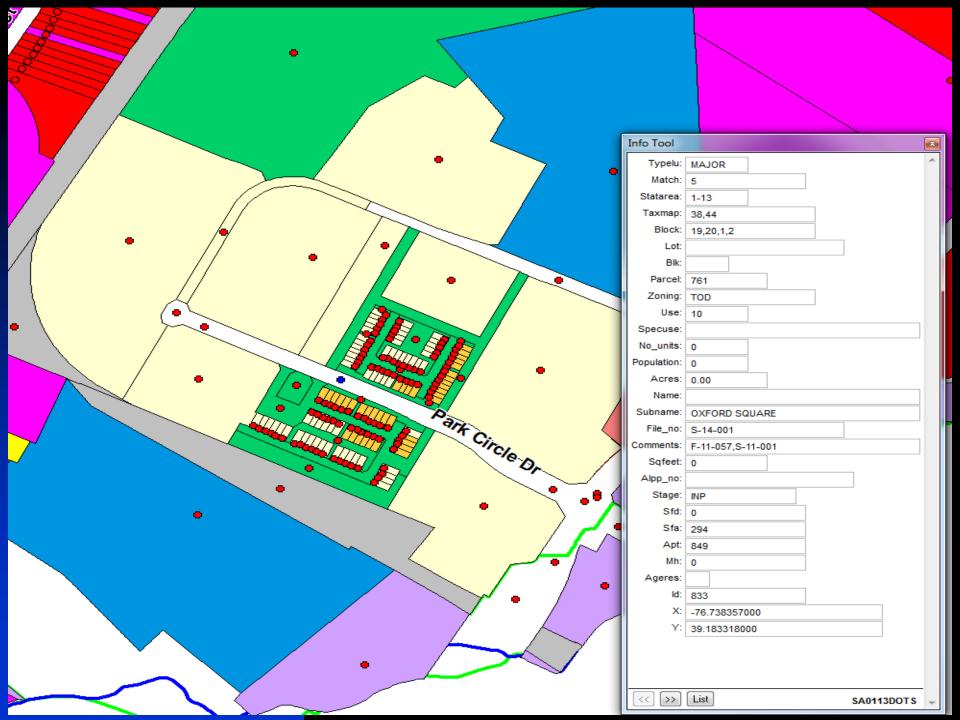
- Detailed tracking through development process:
  - Undeveloped Land
  - 2. Plan in Process
  - Recorded Unbuilt Lot
  - 4. Issued Building Permit
  - 5. Existing Built Unit

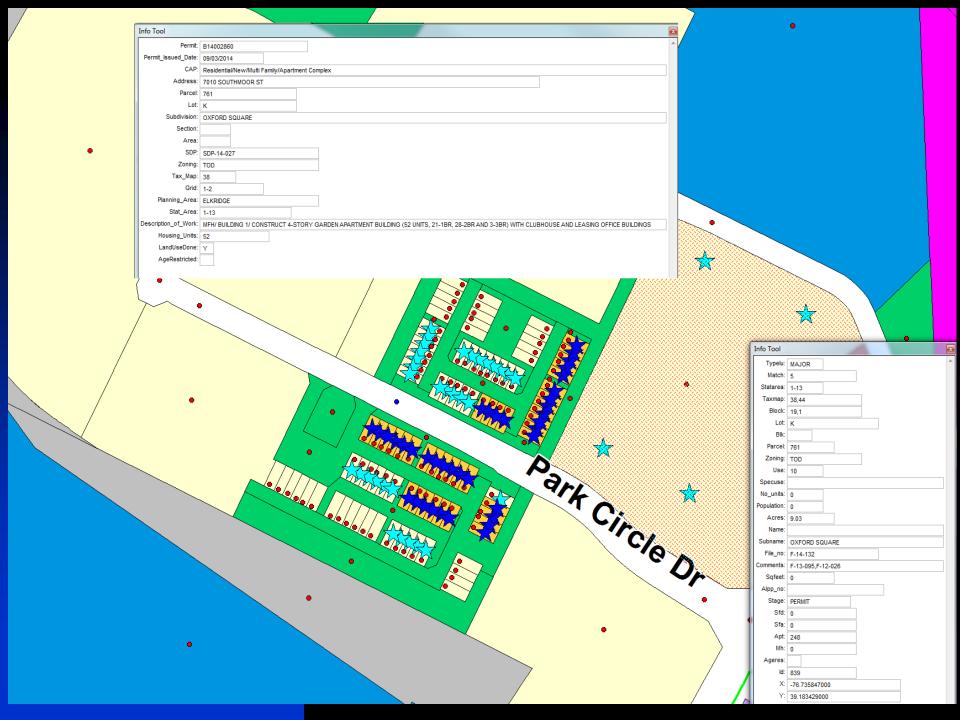














### Household & population projections

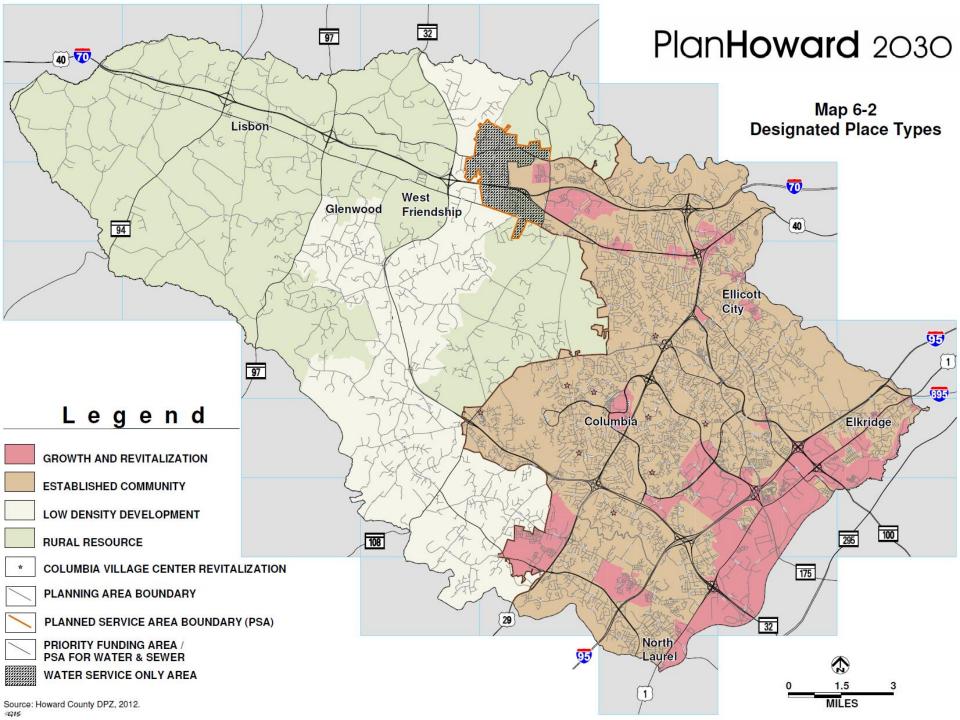
- Makes use of DMS
- Projections are done as part of General Plan
- They are also updated annually
- Used by many agencies (HCPSS, Fire, Police, DPW, Citizen Services, Rec & Parks, Libraries, BMC)

### PlanHoward 2030 allocations

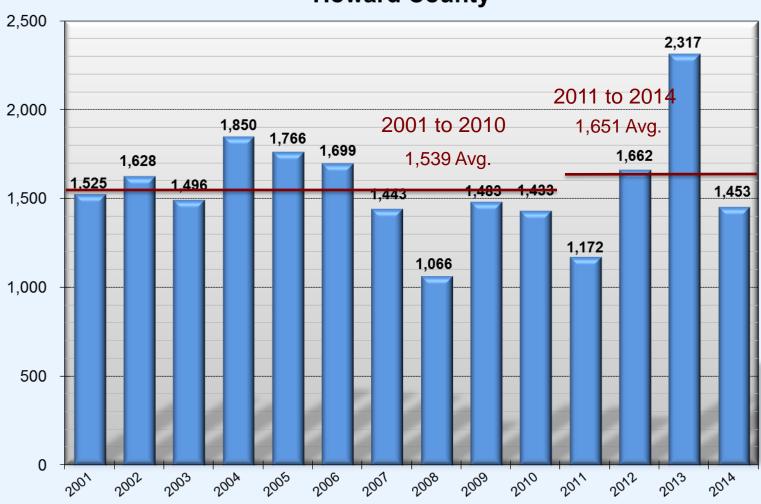
Figure 6-10
Howard County APFO Allocations Chart

	Downtown	Growth and	Established	Green	Rural	Total
Year	Columbia	Revitalization	Communities	Neighborhood	West	County
2015	400	1,200	400	150	100	2,250
2016	350	1,200	400	150	100	2,200
2017	300	1,200	400	150	100	2,150
2018	100	1,200	400	150	100	1,950
2019	100	1,200	400	150	100	1,950
2020	96	1,200	400	150	100	1,946
2021	400	1,200	400	150	100	2,250
2022	350	1,200	400	150	100	2,200
2023	300	1,200	400	150	100	2,150
2024	225	1,200	400	150	100	2,075
2025	200	1,200	400	150	100	2,050
2026	200	1,200	400	150	100	2,050
2027	200	1,200	400	150	100	2,050
2028	179	1,200	400	150	100	2,029
2029	175	1,200	400	150	100	2,025
2030	175	1,200	400	150	100	2,025
20 Year Totals	3,750	19,200	6,400	2,400	1,600	33,350

Source: Howard County DPZ

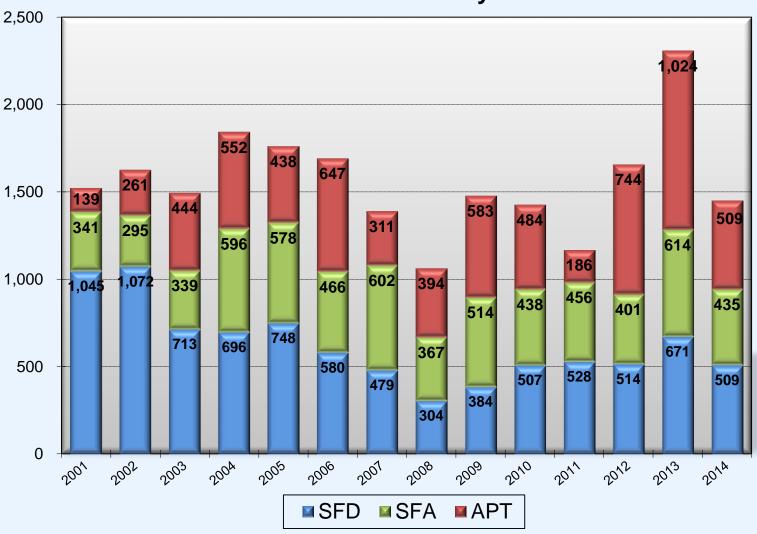


## Total Residential Building Permits Issued 2001 to 2014 Howard County



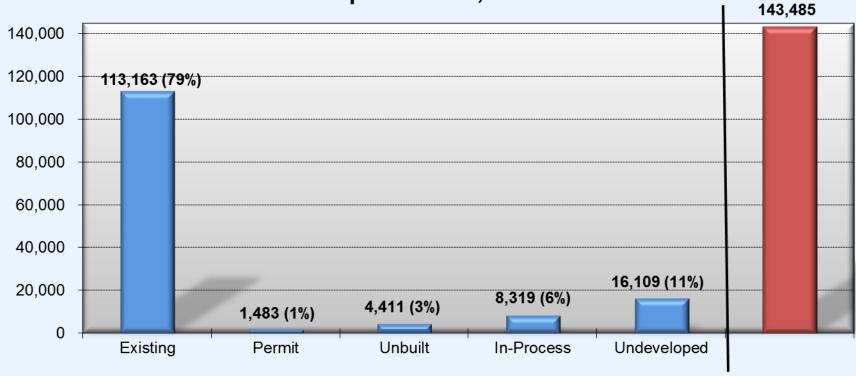
Source: Howard County Department of Inspections, Licenses and Permits

## Total Residential Building Permits Issued 2001 to 2014 Howard County



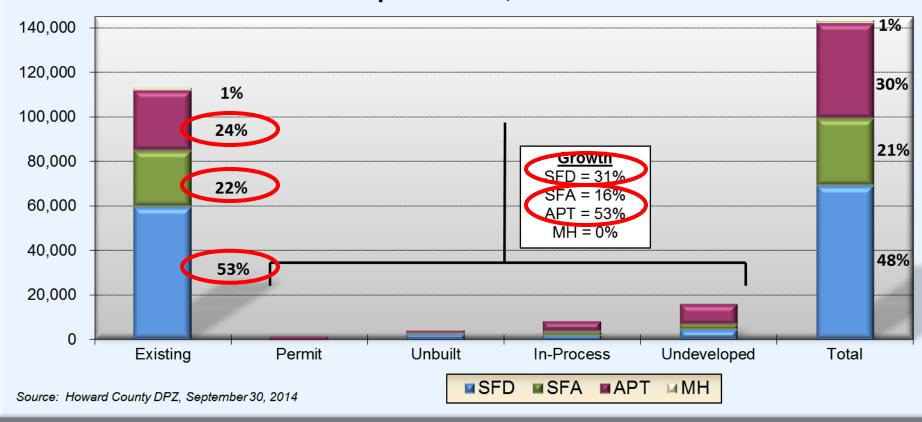
Source: Howard County Department of Inspections, Licenses and Permits

Residential Units by Development Stage in Howard County September 30, 2014

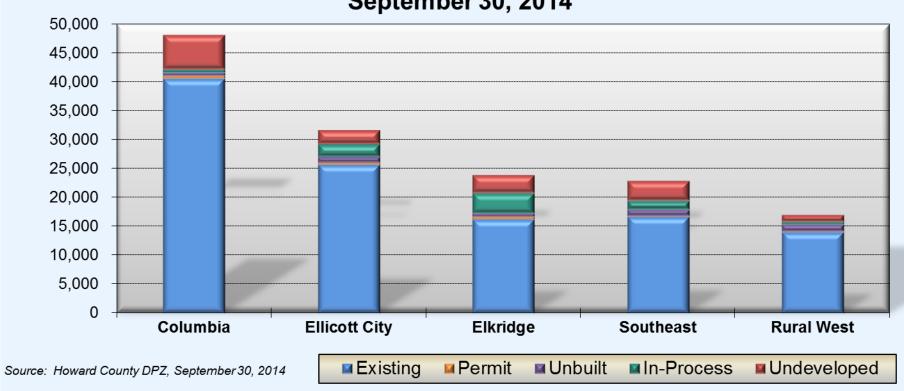


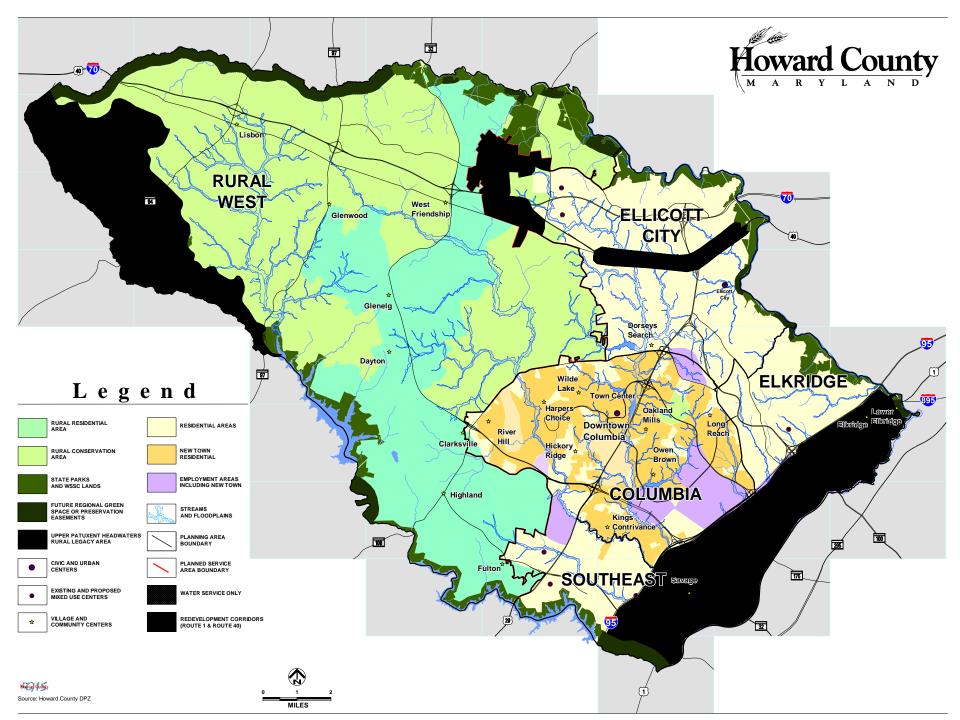
Source: Howard County DPZ, September 30, 2014

#### Residential Units by Development Stage in Howard County September 30, 2014

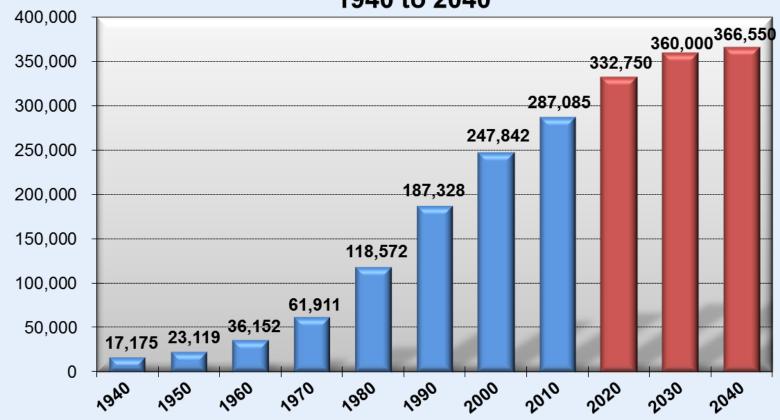


#### Residential Units by Development Stage in Howard County September 30, 2014





## Howard County Population Growth 1940 to 2040



Source: US Census Bureau, DPZ (Round 8B)





Source: US Census Bureau, DPZ (Round 8B)

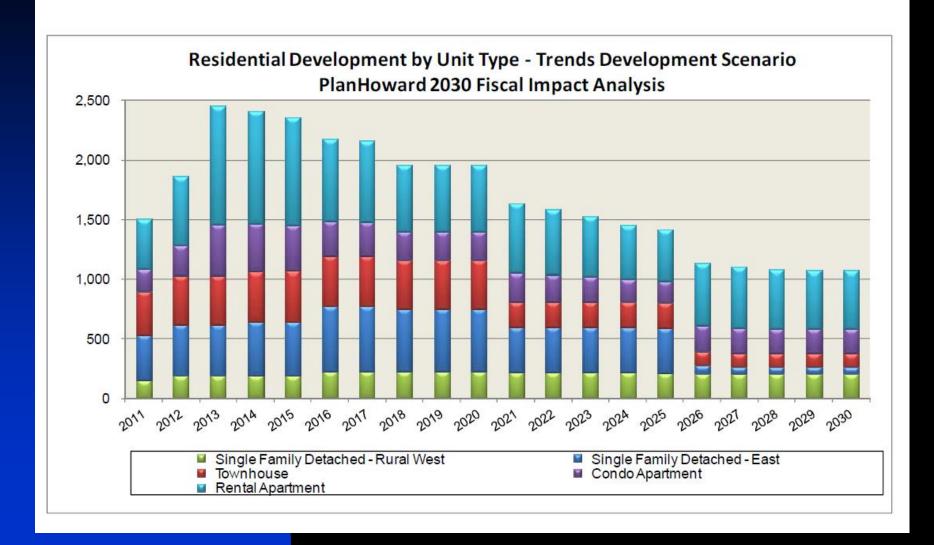
## Fiscal Impact Analysis

- A fiscal analysis measures the costs and revenues to the public sector
- Both operating costs & capital costs are included
- Current levels of service are used to determine cost and revenue factors
- The analysis projects costs and revenues annually over 20 years
- Sensitivity analysis & scenarios are conducted

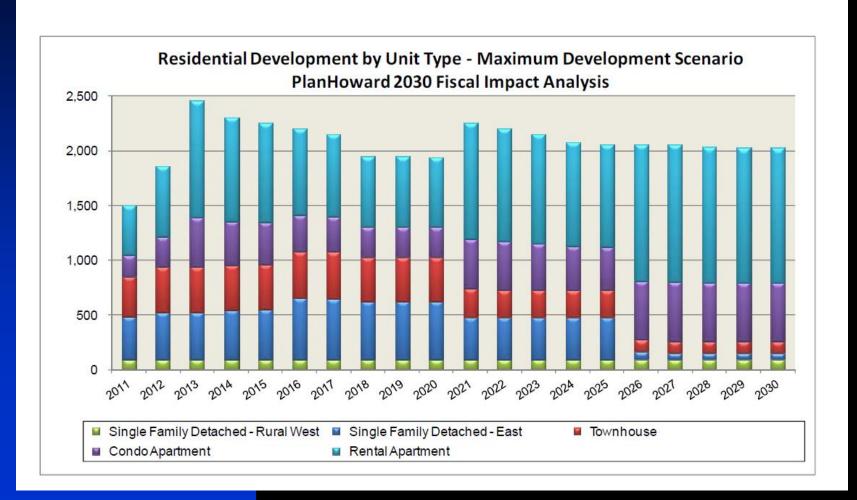
### Fiscal Impact Analysis

- Fiscal impact analyses were done for the 1990, 2000 and 2012 General Plans
- 1990 study resulted in the road excise tax (the study showed potential minor fiscal deficits would occur without it)
- 2000 study showed that growth pays for itself, but that rehab. of older infrastructure would have funding challenges (School transfer tax later proposed, but ended up adopting school excise tax instead)
- 2013 study also shows that new growth pays for itself (Road and School excise taxes included)

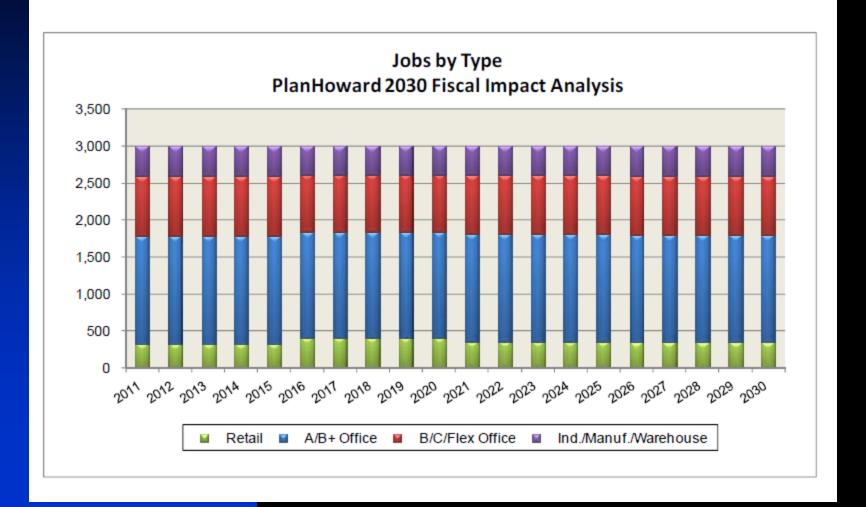
The latest official projections, known as Round 7D in BMC parlance, have been used for the Trends Development scenario in this fiscal impact analysis. These estimates are based on existing zoning and the General Plan 2000 policies and projections. The chart below summarizes the 20 year residential growth by unit type.

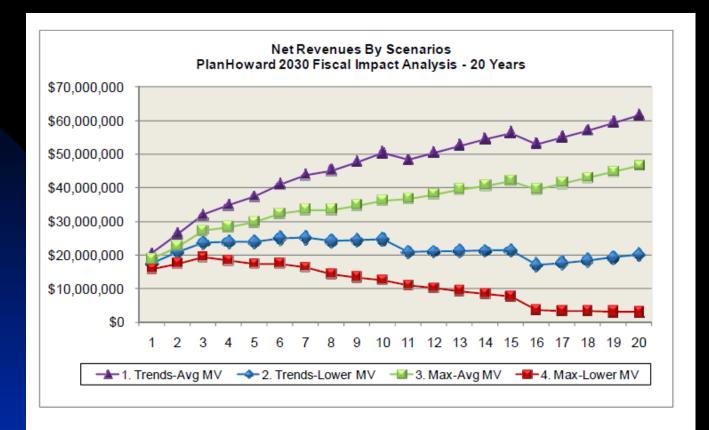


The second residential scenario analyzed in this fiscal analysis is known as the Maximum Development scenario. This is based on the proposal outlined in *PlanHoward 2030* envisioned through its policies and action items. In particular, Figure 6-10 in *PlanHoward 2030* is the basis of this scenario. Unlike the Trends Scenario where development drops off after 2020 given land capacity limitations, the pace continues in the Maximum Development scenario to 2030. To achieve this annual pace additional capacity would need to be created through zoning changes. New PUD zoning is one example outlined in *PlanHoward 2030* of how this could occur. The chart below summarizes this scenario.



The same amount of non-residential development is assumed for both the Trends Development and Maximum Development scenarios. It is assumed, as indicated in *PlanHoward 2030*, that 3,000 new jobs will be added to the County per year from 2010 through 2030. As stated in the plan, this has been the historical pace of job growth on average over the last decade and it is anticipated that this pace will continue into the future. The market study conducted by RCLCO also validates this as a reasonable estimate. Non-residential land capacity has also been analyzed to confirm this assumption. The chart below shows this annual level amount by job type.





### Annual Net Revenues in Year 20 - Scenario Comparison PlanHoward 2030 Fiscal Impact Analysis

			Net Revenues	
Scenario	Revenues	Costs	Revenues	% of Revenues
<ol> <li>Trends, Average Market Values</li> </ol>	\$288,596,255	\$227,052,389	\$61,543,867	21.3%
3. Maximum, Average Market Values	\$298,345,113	\$251,866,425	\$46,478,688	15.6%
2. Trends, Lower Market Values	\$247,207,180	\$227,052,389	\$20,154,792	8.2%
4. Maximum, Lower Market Values	\$254,972,186	\$251,866,425	\$3,105,761	1.2%

## Questions???